

**South Carolina Department of Health and Human Services  
Community Spouse Resource Worksheet**

Institutionalized Individual			Community Spouse		
First	MI	Last	First	MI	Last
Social Security Number			Social Security Number		
Date of Admission			Address of Community Spouse		
Name of Facility					
Address of Facility					

**Section I. Countable Resource Computation**

Resource Description	Institutionalized Individual Value	Plus (+) Community Spouse Value	Less (-) Excluded Value	Equals (=) Countable Value
1. Automobile, Truck, Etc.	\$	\$	\$	\$
2. Life Insurance	\$	\$	\$	\$
3. Cash on Hand	\$	\$	\$	\$
4. Checking Account(s)	\$	\$	\$	\$
5. Savings Account(s)	\$	\$	\$	\$
6. U. S. Savings Bonds	\$	\$	\$	\$
7. Stocks & Bonds	\$	\$	\$	\$
8. Trust Fund	\$	\$	\$	\$
9. Pre-need Burial Contract	\$	\$	\$	\$
10. Burial Space Items	\$	\$	\$	\$
11. Lifetime Rights/Estate Property	\$	\$	\$	\$
12. Personal Property	\$	\$	\$	\$
13. Patient Funds	\$	\$	\$	\$
14. Real Property	\$	\$	\$	\$
15. Other (Specify)	\$	\$	\$	\$
16. Other (Specify)	\$	\$	\$	\$
17. Countable Resource Subtotal (See Section II for Burial Fund Exclusion Computation)	\$	\$	\$	\$
18. Less Burial Fund Exclusion	\$	\$	\$	\$
Total Countable Resources	\$	\$	\$	\$

Section II--Burial Assets Exclusion Computation	Institutionalized Individual	Community Spouse
1A. Maximum Burial Assets Exclusion Limit	\$	\$
1B. Offset (Subtract Value of Irrevocable Burial Arrangements.)	\$	\$
1C. Net Burial Assets Exclusion Limit (A-B)	\$	\$
2A. Combined Value of Burial Assets (Revocable burial contracts, revocable trusts, or other designated assets, e.g., bank account(s).)	\$	\$
2B. Net Burial Assets Exclusion Limit (1C)	\$	\$
2C. Excluded Burial Assets (If 2A equals or exceeds 2B, enter 2B amount here. If 2A is less than 2B, enter 2A amount here.)	\$	\$

**Summary**

Total Countable Resource Amount: \$		Effective Date of Resource Computation:
Eligibility Worker's Signature	Title	Decision Date